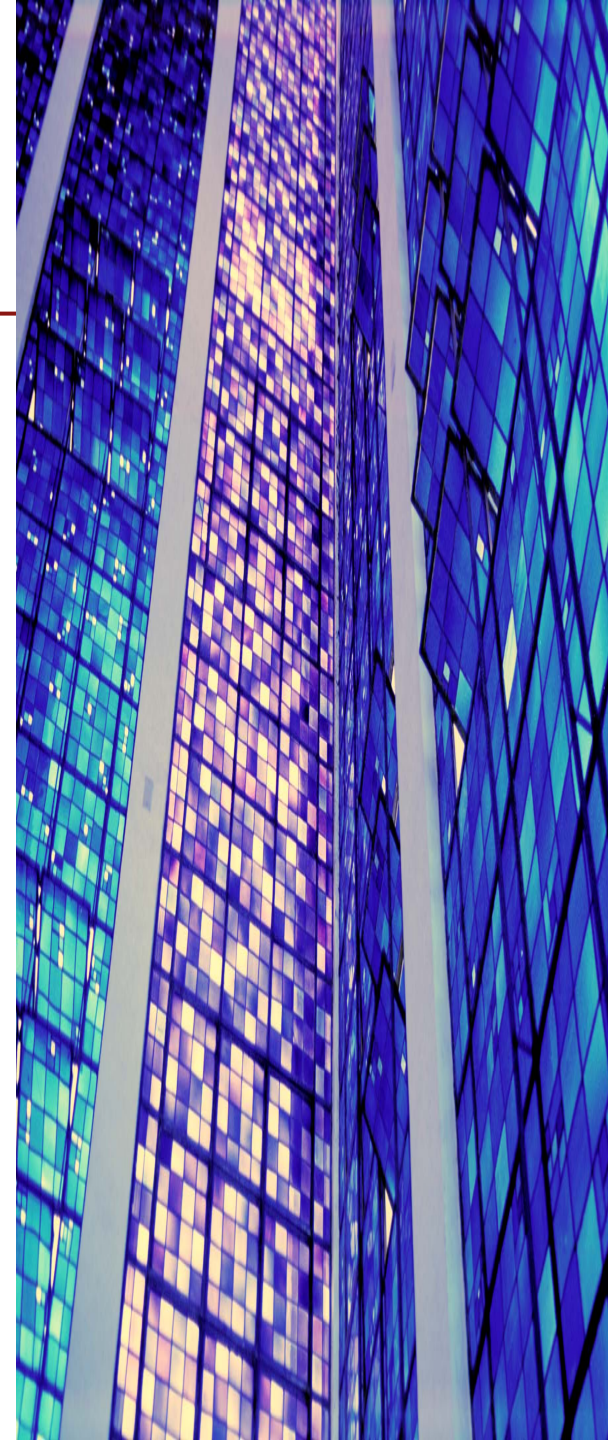




Miami-Dade County Office of Capital Improvements (OCI) Professional Services Division

Equitable Distribution Program (EDP) Training Workshop 2009

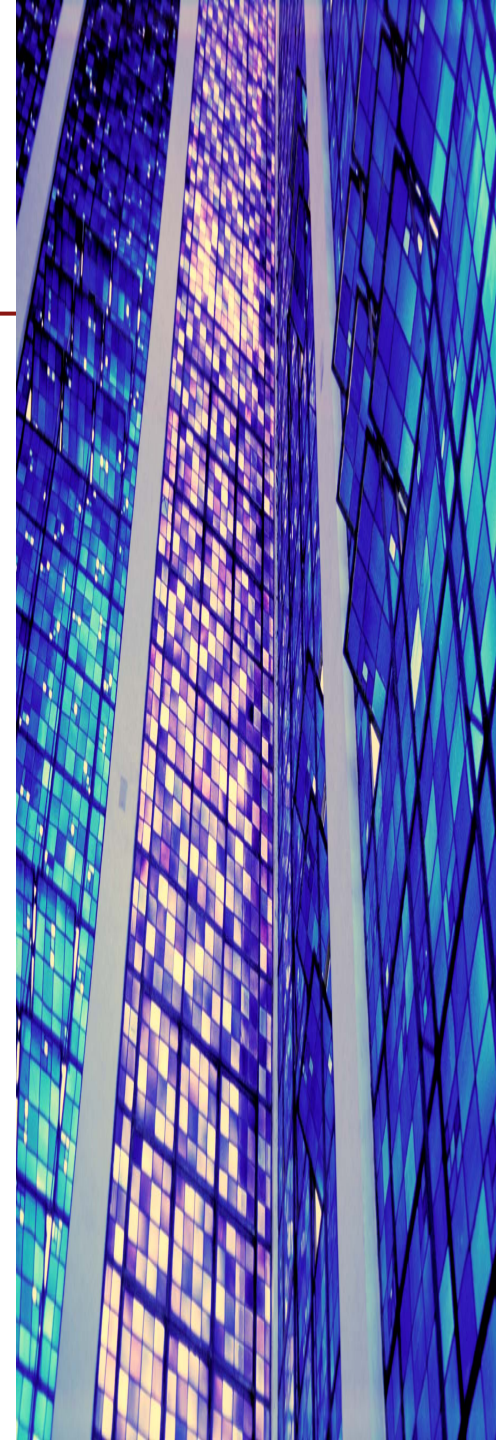
9/2/2009



Office of Capital Improvements (OCI) Professional Services Division Equitable Distribution Program (EDP) Training Workshop 2009

OFFICE OF CAPITAL IMPROVEMENTS (OCI)

- Johnny Martinez, P.E., Director
- Luisa Millan, R.A., Chief
Professional Services Division
(305) 375-1100
lmillan@miamidade.gov
- Elizabeth “Biba” Zabowski
EDP Coordinator
(305) 375-2824
biba@miamidade.gov
- Javier Cruz
EDP Administrative Assistant
(305) 375-1528
jcruz@miamidade.gov
- EDP Forms, Policies and Procedures and Reports
available at: <http://www.miamidade.gov/OCI/>



Equitable Distribution Program - EDP



The BCC established the EDP program for local qualified Architects, Landscape Architects & Engineering professionals through Administrative Order 3-33, Acquisition of Professional Services in 2002.

The primary program objectives are to increase contracting opportunities for qualified community based A & E firms as well as afford County department's access to qualified professionals in an expedited fashion without necessitating a formal solicitation process.

The EDP program established a pool of local A & E professionals and a centralized rotational process to equitably distribute small capital improvement design projects.

All local Architectural & Engineering (A&E) firms, regardless of size, may potentially participate in the EDP program. [The Community Business Enterprise \(CBE\) program does not apply to the EDP.](#)

OCI is responsible for the implementation and administration of the EDP Program.

Equitable Distribution Program - EDP



All County agencies' utilize the EDP pool for their small capital improvement projects which meet the thresholds established in Florida Statute 287.055, unless provided otherwise by the County Manager.

Effective July 1, 2009, Florida Statute 287.055 thresholds for continuous services contracts increased from an estimated construction cost of less than one million dollars (\$1,000,000) to two million (\$2,000,000)

And for study, planning and other activities increased from fifty thousand dollars (\$50,000) in fees to two hundred thousand (\$200,000).

The EDP provides for all A&E services in most of the County's Technical Certification Categories except for Surveying and Testing. These services are available through the Public Works Department pool contracts.

Equitable Distribution Program - EDP



All EDP firms are required to maintain the legislated eligibility requirements as well as comply with the program policies and procedures.

Currently the eligibility requirements are as follow:

- The firm must have active Pre Qualification Certification (PQC) with the County.
- The firm is required to be in business for a minimum of one (1) year and may be required to have a place of business in the County.
- A business owner, alone or as a member of a group, shall own or control only one (1) firm including affiliates in the EDP.
- An individual design professional can only qualify one (1) firm pursuant to the respective Licensing Governing Boards of the State of Florida.
- Firms shall submit an affidavit affirming three (3) years past history of dollars awarded and paid for by the County as a prime and /or sub consultant.

Equitable Distribution Program - EDP



Currently the eligibility requirements (cont)

- EDP firms issued a service order are required to submit appropriate utilization reports to the user department on all new and existing County contracts, including new work authorizations issued after the effective date of the EDP continuing contract.
- Upon written notice, a firm shall execute the EDP agreement and submit the required documents and insurance certificates within ten (10) calendar days or lose their position in the EDP listing for a period of one hundred and eighty (180) days.
- Firm will be required to increase their professional liability from \$250,000 to \$500,000 to be assigned a project with an estimated construction cost greater than one million in construction cost.
- Firms must timely notify OCI of any firm changes. All EDP correspondences and emails are directed only to the designated firm contact.

Equitable Distribution Program - EDP



EDP FIRMS

- When a firm enters the EDP program, they are ranked in all of the categories for which the firm is technically certified.
- A firm's position in a technical pool is determined by a firm's rotation value (RV). The RV is calculate from firm's past three years of County project awards and monies received for professional services as a prime and/or sub consultant. The RV formula is detailed on the OCI website.
- The OCI EDP website <http://www.miamidade.gov/OCI/> is a firms EDP resource for general program information, firm and projects reports, procedures and forms.
- The EDP Firm report lists firms in rotational order for each technical category and the EDP Work Assignment report list the EDP projects by department. The reports are updated quarterly. The Firm report reflects a firm's standing in a particular TC area, however, the positions could change everyday. The Small Business Development (SBD) work history database directly feeds to the EDP database in real time.

EDP Web Page

<http://www.miamidade.gov/OCI/>
Reports, Forms and Procedures



miamidade.gov
Office of Capital Improvements

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- [Architectural & Engineering Services](#)
- [Pre-Qualification Certification](#)
- [Technical Certification](#)
- [Equitable Distribution Program](#)

Contracts and Standards Division

- [Miscellaneous Construction](#)

[Print](#) [Email](#) [Helpful?](#)

Economic Stimulus for Building Industry

An important role of government is investing in the infrastructure of a community. In Miami-Dade, an ambitious capital construction program is underway with hundreds of projects now on the drawing board ranging from small neighborhood improvements, such as parks and drainage systems, to the large, ambitious projects including a tunnel to improve access to the seaport and the new museum complex planned at the site of what is now Bicentennial Park.

» [View Full Story](#)

OCI Slideshow

The \$2.9 billion Building Better Communities Obligation Bond Program includes more than 100 projects throughout Miami-Dade.

Local intranet

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EDP – Web Page



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- [Equitable Distribution Program](#)

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Equitable Distribution Program (EDP)

- [Reports](#)
- [Forms and Procedures](#)

Miami-Dade County created the Equitable Distribution Program (EDP) to provide a process to equitably distribute architectural, engineering and landscape architectural (A&E) assignments for projects with an estimated construction cost of less than \$1 million and \$50,000 for study activities. [Administrative Order 3-39](#) establishes the policy and procedures for the EDP.

All A&E firms with a local Miami-Dade County office that meet the program eligibility requirements may participate in this program. The EDP is not a Minority and/or Small Business Program.

The basic eligibility requirements are as follows:

1. Miami-Dade County Pre-Qualification Certification
2. Firm in business for a minimum of one (1) year
3. Individual may qualify only one firm in respective A&E governing board
4. Have actual place of business in Miami-Dade County
5. Affirm past three (3) years, in addition to current year, of monies awarded and paid on County projects as a prime and/or sub-consultant

EDP Resources

- [Governing Legislation](#)
- [Vendor Registration](#)
- [EDP FAQs](#)
- [County Calendar](#)

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- [Pre-Qualification Certification](#)
- [Technical Certification](#)
- [Equitable Distribution Program](#)

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- [MCC 7040 Contract](#)
- [MCC 7360 Contract](#)
- [Business Loan Program](#)

Bond Program Division

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Reports

Equitable Distribution Program (EDP)

- [EDP Work Assignment](#)
This report represents all of the EDP work assignments from the program inception until the designated end date indicated on the report.
- [EDP Firms](#)
This report lists, by technical category, all active firms in rotational value order, as of the date of the report.

Assignments are issued on a rotational basis. The firm's initial position in the EDP Pool is based on each of the firm's approved County technical categories and the rotational value (RV).

The rotational value (RV) is determined by the net dollars (gross prime payments (GP) minus sub payments (SP) paid to a firm in the last 3 years (NP), plus a potential earnings factor from awards. The potential earnings (PE) is determined by adding awards in the last 3 years minus gross prime payments on these awards in the last 3 years times a factor of 65%.

Thus:
 $RV = NP + PE$
 $NP = GP - SP$
 $PE = (A - GP) \times 65\%$

EDP Resources

- [Governing Legislation](#)
- [Vendor Registration](#)
- [EDP FAQs](#)
- [County Calendar](#)

Local intranet

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EDP – Work Assignments



http://www.miamidade.gov/oci/library/EDP_assignment.pdf - Windows Internet Explorer provided by Miami-Dade County

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Miami-Dade County

E D P

Equitable Distribution Program

(Requests from 05/02/2002 to 01/09/2009)

January 09, 2009 12:07 PM

DEPARTMENT OF ENVIRONMENTAL RESOURCES MANAGEMENT

EDP-DE-001,5,6-MDPR - CLOSED Est. Cost: \$53,000.00
IVES ESTATES PARK - ASSESSMENT

12/04/2002	1002	NUTTING ENGINEERS OF FLORIDA INC	PRIME	✓
------------	------	----------------------------------	-------	---

EDP-DE-001-CORR - CLOSED Est. Cost: \$37,000.00
MDCR-SANITARY SEWER EVALUATION SURVEY

08/01/2002	0601	ES CONSULTANTS INC.	PRIME	✓	CBE, DBE, MICRO/SBE
	1001	ES CONSULTANTS INC.	PRIME	✓	CBE, DBE, MICRO/SBE

EDP-DE-001-CORR

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EDP Firms



The report lists, by technical category, all active firms in rotational value order, as of the date of the report.

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EDP Firms

Monies Awarded/Paid

** This report is dynamic and updated on a daily basis*

Monies Awarded	From: 01/12/2006	To: 01/12/2009
Monies Paid	From: 01/12/2006	To: 01/12/2009

Firm Name	Monies Awarded	Monies Paid	Rotation Value	EDP Frozen	Active Inactive
1800 ARCHITECTURAL CONSTRUCTION MANAGEMENT					
AXIOMA 3, INC.	\$0.00	\$0.00	\$0		A
GALLARDO ARCHITECTS, INC	\$0.00	\$0.00	\$0		A
PROTEK ELECTRICAL ENGINEERING, INC.	\$15,000.00	\$0.00	\$9,750		A
PALENZUELA & HEVIA DESIGN GROUP, INC.	\$37,200.00	\$0.00	\$24,180		A
ARMANDO M. MONTERO & ASSOCIATES, P. A.	\$47,222.50	\$0.00	\$30,694.63		A
R. E. CHISHOLM ARCHITECTS, INC.	\$49,470.00	\$0.00	\$32,155.5		A
BORGES & ASSOCIATES, P.A.	\$50,000.00	\$0.00	\$32,500		A
BEA ARCHITECTS, INC.	\$50,000.00	\$0.00	\$32,500		A
LOCUS ARCHITECTURE, INC.	\$65,000.00	\$0.00	\$42,250		A
BC ARCHITECTS A1A, INC.	\$65,000.00	\$0.00	\$42,250		A
TSAO DESIGN GROUP, INCORPORATED	\$72,920.00	\$0.00	\$47,398		A
PEREZ ASSOCIATES	\$52,052.22	\$46,707.02	\$50,212.04		A

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Equitable Distribution Program - EDP



PROGRAM STATS since the commencement of the program in July 2002:

- Over 400 firms have been placed in the program
- Currently there are 380+- active EDP Firms including 61 new participants
- +1,300 EDP work assignments have been distributed with potential fees of \$60,000,000.
- 273 EDP firms have participated on EDP work assignments. Over 85% of these firms are CBEs.

Equitable Distribution Program - EDP



The County adopted a SUSTAINABILITY POLICY (Implementing Order 8-8) in 2008.

EDP projects must comply with the County's sustainability standards if applicable.

- **New Construction:** All new construction projects shall be required to attain “Silver” or higher level rating under the LEED -NC Rating System.
- **Major Renovations & Remodels:** All major renovations/remodels shall attain “Certified” or higher level rating under the LEED-NC Rating System.
- **Non-major Renovations/remodels:** All non-major renovations/ remodels begun shall attain “Certified” or higher level rating under the appropriate LEED Rating System such as LEED-NC, LEED-EB or LEED-CI.
- **Renovation, remodels, and other building upgrades not meeting the above criteria are encouraged to incorporate the maximum number of LEED-approved green building practices as are feasible from a practical and fiscal perspective; however, LEED certification will not be required.**

Equitable Distribution Program - EDP



SUSTAINABILITY (Implementing Order 8-8)

- **Substitution of Standard:** the requirement for applying the appropriate LEED standard under any of the above-referenced categories may be exempted or modified due to special circumstances of the project. Such exemption or modification shall be for the express purpose of ensuring the use of the most appropriate or relevant rating standard, and shall not, in any way, exempt the requirement to apply green building practices to the maximum extent possible. This substitution process shall be administered by and through the Sustainability Manager.

Firms should work with Department Project Managers to maximize the incorporation of green building practices.

Many Departments have already developed guidelines and specifications for the use of green building materials, reduced site disturbances and construction debris controls, increased water and energy efficiencies, heat island reductions, at a minimum new roofs must comply with the FPL incentive and rebate program, building commissioning, etc....

EDP - Work Assignment Procedures



EDP REQUESTS

- Department submit an EDP Request Form (RF) to OCI for assignment of appropriate design professionals from the Pool. The Request Form requires basic project information such as the scope of work, required technical certification/s and estimated project fees.
- OCI reviews the form for completeness and processes the request through the EDP database for the next available (3) prime firms based on their ranking in the Pool within the requested technical certification categories.
- OCI will then forward the project Selection Form (SF) listing the next 3 qualified prime firms to the department.
- Project selections, negotiations and services are then conducted by the User Agency directly with the consultants.
- OCI project communications are typically only with the Department PM.

EDP - Work Assignment Procedures



PRIME FIRM SELECTION

- The User Department evaluates the (3) Primes list on the Selection Form and determines the most qualified firm for the project. Departments must document the factors utilized to determine their prime firm selection.
- Fees should not be considered in the selection process.
- The selection process may include telephone interviews and/or meetings with the firms, review of the firm's qualifications and specific experience in the area of work, availability of necessary staff for the task, inquiries with other Departments that have utilized the firm as well as review of Past Performance Evaluations.
- When Departments notify OCI of their prime selection, the estimated project fee will be assessed to the prime firm's award record.
- Firms are inactivated from the rotation for a maximum of 10 days while under consideration for an assignment.

EDP - Work Assignment Procedures



- Firms that do not have an active PSA are required to submit the PSA documentation including insurance within ten days from notification of a work assignment or risk losing the assignment and possibly being inactivated in the program for up to 180 days.
- The typical County processing time for the EDP PSA, provided all the necessary documents are submitted timely is 20 days.
- During this time, Departments should proceed with proposal submittals, EDP sub selection process if applicable, negotiations....
- If a Department needs to commence services in less than 30 days, they can provide an explanation to OCI and request a list of firms with an executed PSA.
- Departments should not finalize/issue work authorization to a consultant until OCI has confirmed that the contract and insurance is approved.

EDP - Work Assignment Procedures



SUB CONSULTANT SELECTION (if applicable)

- Once the prime is selected, OCI will generate the lists of necessary subs for the prime's consideration.
- The selected Prime must select sub consultants through the EDP sub selection process.
- The Department Project Manager (PM) will provide the prime with the project Selection Form listing the next 4 firms for each requested sub consultant technical category.
- If the listed firms are not responsive to the prime's inquiries or indicate they are not interested, the firm should notify the PM. Then the Department will address the issue with OCI. OCI will provide the additional sub firms for the prime's consideration and if necessary directly assist a firm in securing appropriate subs.

EDP - Work Assignment Procedures



- Firms are not allowed to utilize non EDP firms and/or EDP firms for any professional services that were not selected through the EDP sub consultant selection process. The only professional firms authorized to participate on an EDP project are those listed on the EDP Project Assignment Form.
- Utilizing other professionals or firms as well as non employees for professional services or providing the services internally when the firm is not technically certified in the technical service area IS NOT permitted and could result in a firm's removal from the program and/or non-payment for services rendered.
- Firms may be inactivated from the EDP program if they utilize non EDP authorized professionals

EDP - Work Assignment Procedures



WORK AUTHORIZATION

- As soon as the sub/s are determined, the prime should notify the User Agency
- Pursuant to the EDP PSA terms, all services provided by sub consultants shall be pursuant to appropriate agreements between the parties.
- The PM will notify OCI of the firm selections. OCI will finalize the team authorized team assignment and forward the Department the Assignment Form and a copy of the prime firm's active EDP PSA.
- Once the negotiations are completed, the Department must have the project participants complete the OCI Project Agreement Form (AF) and forward to OCI with a copy Department's work authorization.

EDP - Work Assignment Procedures



WORK AUTHORIZATION

- If the negotiations fail and the User Department does not choose to negotiate with the next available firms, the User Department is required to notify OCI with a request for additional firms and a comprehensive explanation for OCI's consideration.
- Upon receipt of the executed OCI Project Assignment Form and a copy of the Work Authorization, OCI will update the EDP project database and the firm's award records will be updated accordingly.
- Any deviation from the Assignment Form such as the initial authorized fee must be approved by OCI. Upon approval OCI will provide written approval to the PM and a revised Assignment Form.

EDP - Work Assignment Procedures



PROJECT SERVICES

- The User Department oversees the work performed under the executed Work Authorization.
- Departments are responsible for processing pay requests timely for all services rendered and verify that the firm's insurance is in compliance prior to payment.
- EDP Utilization Reports are required to be submitted by the consultant with invoices if the project fee is greater than \$100,000. For projects less than \$100,000, only the EDP Close Report is required to be completed at the completion of the EDP assignment and acts as the final Utilization Report for all EDP assignments.
- If the prime is not abiding by their service order obligations such as schedule, Departments will address right away with the firm. If the problem(s) persists, Departments will contact OCI to assist them with addressing the issue(s) and potential consequences with the consultant.

EDP - Work Assignment Procedures



Assignment and Agreement Form

Firms and Departments are required to complete the form.

E D P
Equitable Distribution Program
ASSIGNMENT AND AGREEMENT FORM

OCI Office of Capital Improvements Miami-Dade County

Section I	
User Department	Project Manager
PUBLIC WORKS DEPARTMENT	CALLE, JOSE
Telephone Number	Date
305-375-0001	09/26/2007
Fax Number	
--	
Project: EDP-DUMP-WORKSHOP	Title: NW 1 ST ROADWAY IMPROVEMENTS
Scope of Work	
Prime	Sub
Tech. Conf. Required: 0302, 1600	0310
Initial Estimated Cost: \$72,000.00	
Forward the completed Assignment and Agreement Form with a copy of the Service Order to OCI	
Section II	
Selected PRIME Firms	
T.C. = 0302, 1600	
Company Name	Contact Name
JRA, INC.	JOAQUIN FERRER
Phone#	Fax#
305-270-7800	305-279-2581
Authorizing Representative	Signature
Date	Auth. Fees (Award)
Selected SUBCONTRACTING Firms	
Group 1 T.C. = 0310	
Company Name	Contact Name
YOUSSEF HACHEM CONSULTING ENGINEERING	YOUSSEF HACHEM
Phone#	Fax#
786-297-9120	305-270-8206
Authorizing Representative	Signature
Date	
Section III	
CALLE, JOSE	
Name of Project Manager	Signature
Date	
WALKER, JAY	
Department Designee	Signature
Date	
Please forward all information and questions to Elizabeth "Biba" Zabowski, OCI biba@miamidade.gov Fax 305-350-6265 Tel 305-375-2824 111 NW First Street, SPCC, 21st Floor, Miami, Florida 33128	

E D P
Equitable Distribution Program
ASSIGNMENT AND AGREEMENT FORM

OCI Office of Capital Improvements Miami-Dade County

Section I	
User Department	Project Manager
PUBLIC WORKS DEPARTMENT	CALLE, JOSE
Telephone Number	Date
305-375-0001	09/26/2007
Fax Number	
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Project: EDP-DUMP-WORKSHOP	Title: NW 1 ST ROADWAY IMPROVEMENTS
Scope of Work	
Prime	Sub
Tech. Conf. Required: 0302, 1600	0310
Initial Estimated Cost: \$72,000.00	
Forward the completed Assignment and Agreement Form with a copy of the Service Order to OCI	
Section II	
Selected PRIME Firms	
T.C. = 0302, 1600	
Company Name	Contact Name
JRA, INC.	JOAQUIN FERRER
Phone#	Fax#
305-270-7800	305-279-2581
Authorizing Representative	Signature
Elizabeth Zabowski	
Date	Auth. Fees (Award)
10/07	\$71,420
Selected SUBCONTRACTING Firms	
Group 1 T.C. = 0310	
Company Name	Contact Name
YOUSSEF HACHEM CONSULTING ENGINEERING	YOUSSEF HACHEM
Phone#	Fax#
786-297-9120	305-270-8206
Authorizing Representative	Signature
ANIELA M. CORDOVA	
Date	
10/16/07	
Section III	
CALLE, JOSE	
Name of Project Manager	Signature
Date	
WALKER, JAY	
Department Designee	Signature
Date	
Please forward all information and questions to Elizabeth "Biba" Zabowski, OCI biba@miamidade.gov Fax 305-350-6265 Tel 305-375-2824 111 NW First Street, SPCC, 21st Floor, Miami, Florida 33128	

EDP- Work Assignment Procedures



PROJECT CONCLUSION

- Upon project completion, the Department should forward the EDP specific Close Out Utilization Report to the firm.
- The Close Out Report is required to be completed by the primes, sub consultants and Depts representatives and acts as the final utilization report. The prime and the sub should designate the total dollars paid. The prime should not subtract their subs payments from their total.
- The Department PM is responsible to forward the completed form to OCI with a copy of a final payment record.
- OCI will close out the project and forward the form to SBD to input the project dollars appropriately to each participant.
- At a minimum, one Past Performance Evaluation (PPE) is required to be completed by the PM at the completion of an EDP project.

EDP - Work Assignment Procedures



Close Out Utilization Report
Firms to complete the form and submit to the PM with the final invoice.

E D P
Equitable Distribution Program
CLOSE OUT UTILIZATION REPORT
OCI Office of Capital Improvements Miami-Dade County

Section I

User Department	Project Manager	Telephone Number	Date
PUBLIC WORKS DEPARTMENT	CALLE, JOSE	305-375-0001	09/26/2007
		Fax Number	

Project: EDP-DUMP-WORKSHOP Title: NW 1 ST ROADWAY IMPROVEMENTS

Scope of Work

Prime	Sub
Tech. Cert. Required 0302, 1600	0310
Award Amount \$73,400.00	

Please note that final payment should not be processed without a Close Out Form. Forward the completed Close Out Form with a copy of the Final Pay Request to OCI.

Section II

Selected PRIME Firms

T.C. = 0302, 1600

Company Name	Contact Name	Phone#	Fax#
JRA, INC.	JOAQUIN FERRER	305-276-7800	305-276-2581
Authorizing Representative	Signature	Date	Final Fee (UR)

Selected SUBCONTRACTING Firms

Group 1 T.C. = 0310

Company Name	Contact Name	Phone#	Fax#
YOUSSEF HACHEM CONSULTING ENGINEERING	YOUSSEF HACHEM	786-297-9120	305-276-8206
Authorizing Representative	Signature	Date	Final Fee (UR)

Section III

CALLE, JOSE	
Name of Project Manager	Signature
WALKER, JAY	
Department Designee	Signature
	Date

Please forward all information and questions to Elizabeth "Biba" Zabowski, OCI
biba@miamidade.gov Fax 305-350-8265 Tel 305-375-2624
111 NW First Street, SPCC, 21st Floor, Miami, Florida 33128

E D P
Equitable Distribution Program
CLOSE OUT UTILIZATION REPORT
OCI Office of Capital Improvements Miami-Dade County

Section I

User Department	Project Manager	Telephone Number	Date
PUBLIC WORKS DEPARTMENT	CALLE, JOSE	305-375-0001	09/26/2007
		Fax Number	

Project: EDP-DUMP-WORKSHOP Title: NW 1 ST ROADWAY IMPROVEMENTS

Scope of Work

Prime	Sub
Tech. Cert. Required 0302, 1600	0310
Award Amount \$73,400.00	

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T.C. = 0302, 1600

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Authorizing Representative	Signature	Date	Final Fee (UR)

Selected SUBCONTRACTING Firms

Group 1 T.C. = 0310

Company Name	Contact Name	Phone#	Fax#
YOUSSEF HACHEM CONSULTING ENGINEERING	YOUSSEF HACHEM	786-297-9120	305-276-8206
Authorizing Representative	Signature	Date	Final Fee (UR)

Section III

CALLE, JOSE	
Name of Project Manager	Signature
WALKER, JAY	
Department Designee	Signature
	Date

Please forward all information and questions to Elizabeth "Biba" Zabowski, OCI
biba@miamidade.gov Fax 305-350-8265 Tel 305-375-2624
111 NW First Street, SPCC, 21st Floor, Miami, Florida 33128

Equitable Distribution Program - EDP



Past Performance Evaluation (PPE) Form

At a minimum, one Performance Evaluation Form is required to be completed by the project manager of the User department at the conclusion of each EDP project.

A copy should be forwarded to the firm.

Evaluations can be utilized by the County when assessing a consultants qualifications.

MIAMI-DADE COUNTY, FLORIDA
Capital Improvements Information System
Miami-Dade Fire Rescue Department
Contractor Evaluation

EDP Project: EDP-DUMP- WORKSHOP
Title: NW 1st ST. ROADWAY IMPROVEMENTS
Contractor: CALLE, JOSE
Department Contact: CALLE, JOSE

Evaluation Type: Standard Evaluation
FEIN:
Award Amount: \$ 72,000.00

Evaluator ID: biba Date: 10/11/2007 Period: Select Evaluation Period...

	4	3	2	1	N/A	Criteria
1-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Schedule - Quality of schedule & adherence to schedule resulting in timeliness minimizing delay to the owner and community.
2-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Cost effectiveness & efficiency - Budget compliance & value of work.
3-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Vision - Design - Concepts or adherence to criteria.
4-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Cooperation - Teamwork & relationship with owner, subs and suppliers.
5-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Coordination - Ability to organize, schedule and complete tasks in adherence to schedule.
6-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Accuracy & Technical Skills - Cost estimating, scheduling, shop and other plans, manuals, project documentation and conflict resolution.
7-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Completeness - Compliance with contract documents, permits, Codes & s
8-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Responsiveness - Timely, clear & concise responses to owner comments correspondence.
9-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Commitment - Intangibles & contribution to project success.
10-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Personnel - Quality and dedication of project staff.
11-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Management - Leadership ability.
12-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Quality - Work performed correctly the first time.

Overall Performance Average: 0

Documentation that supports this evaluation and Contractor's/Consultant's comments can be obtained by contact at phone#

Evaluation Reviewed by: Supervisor ☐ Division Chief ☐ Assistant Director ☐ Director ☐

The method of delivery of this evaluation to contractor/consultant: Certified Mail ☐ EMail ☐ Fax ☐ Hand (Unresponsive Performance by contractor/consultant requires 2 delivery methods)

Evaluation delivered to:

* Rating Key

4 Superior performance - Exemplary quality, no intervention required - project completed on time or early at or below budget with no change orders or amendments other than owner requested changes.

3 Satisfactory performance - Minor errors noted, addressed with timely corrective action. No serious errors noted or corrective action needed.

2 Guarded performance Errors and Omissions documented in writing with timely corrective action.

1 Unresponsive performance documented in writing without timely corrective action.

N/A No Information

EDP - Work Assignment Procedures



PROJECT CANCELLATION

- In the event that an assignment is canceled, the User Department should notify the firm and OCI in writing within 3 days. If any payments were processed, a Close Out Utilization Report must be completed by all required parties and forwarded by the Department to OCI. OCI will cancel the project and apply any expenditure appropriately to project participants.

CONSTRUCTION ADMINISTRATION SERVICES

- As of January 1, 2008, initial project work authorizations will not include construction management/construction administration services when the estimated project construction cost is greater than one (1) million dollars. The initial service order can include the future services (negotiated fees or not) and indicate that they will be authorized at the end of the the project design phase.
- A Phase 2 EDP project assignment will be created for CM services as required.

Equitable Distribution Program - EDP



ALTERNATIVE ASSIGNMENT PROCEDURES

- Pursuant to the EDP legislation, OCI has the authority to bypass firms in the EDP rotation based on the volume of work or unique expertise requirements within a category if deemed required for the particular assignment and/or in the best interest of the County.

The two typical alternative assignment methods are:

- Requirement for a firm with special expertise. Departments provide OCI with a description of the project scope and unique expertise requirements. If approved by OCI, OCI will conduct surveys of all the appropriate participants for the special requirements.
Surveys are sent by email to the firms designated contact. Firms are advised to keep their email contact information updated with OCI to ensure they have the opportunity to review and respond to surveys.
The respondents will be considered in accordance to their pool ranking. Project numbers include a S prefix and TC 9999.
For JMH projects, the TC will be EDPJMH A or E. Firms that qualify pursuant the EDP medical facility survey will be assigned the TC(s).

Equitable Distribution Program - EDP



ALTERNATIVE ASSIGNMENT PROCEDURES

- Departments requesting the services of a specific firm. A specific firm request requires a written justification memo from the requesting Department Director to the OCI Director. The request is evaluated and may also be forwarded to the Department's Assistant County Manager for comment prior to making a final determination.
Special requests are typically processed for the continuation of project services by the Architect and/or Engineer of record.
Project numbers include a SR prefix and TC 9999.

Equitable Distribution Program - EDP



- The EDP guidelines established in Administrative Order 3-39 are currently under review and will be modified. Once the new legislation is effective, applicants and existing participants that do not meet the newly approved program guidelines will be ineligible to continue to participate in the program until such time that they can meet the new requirements. The anticipated approval and implementation is for early next year.

The proposed program revisions include the following:

- The firm is required to be in business performing professional services from a business address in Miami-Dade County for a minimum of one (1) year. In addition, at least one (1) licensed professional A & E full-time staff person must provide services from the Miami-Dade County office. This individual shall be the firm's EDP contact.
- Firm may be restricted to receive further assignments once it reaches over \$250,000 in active assignments, or after 10 assignments in a calendar year.
- If an existing EDP participant has not received a minimum of \$25,000 in assignment fees, they will remain in the top of the rotation above a new participant with a lower dollar value.

Equitable Distribution Program - EDP



The proposed program revisions (cont)

- Increase prime firms generated for a Department consideration for an assignment from 3 to an minimum of 4. At least 5 sub-consultant firms would be provided to the prime for consideration per assignment.
- A 25% Rotational Value reduction if the firm's has maintained their A & E business in Dade County for 5 years or more.
- The EDP will not be mandated as the only method for the County to obtain professional services under the Florida Statute 287.055 thresholds for continuous services with the exception of the OCI Director.
- Inactivation consequences for repeated PQC and insurance lapses could result in program inactivation for more than 30 days.

Equitable Distribution Program - EDP



CRITICAL ISSUES OVERVIEW

Timely notify OCI of any firm changes. All EDP correspondences and emails are directed only to the designated firm contact.

Maintain EDP eligibility requirements, comply with the EDP policies and procedures, timely respond to Department inquiries and meet your service order obligations.

Always utilize EDP sub process for any professional sub consultant services.

Submit EDP Utilization Reports for all EDP assignments with fees greater than \$100,000 with invoices to the Agency Project Manager.

Submit a completed Close Out Form to the PM with the final invoice. The Close Out Report acts as the final utilization report for all EDP projects.

■ QUESTIONS and DISCUSSIONS